

## **INSTRUCTIONS FOR RETIREMENT SYSTEM ELECTION (MR – 372)**

The following instructions are to assist you and your employer in completing the Retirement System Election (Form# MR 372). The first section of the form must be completed by you with assistance from your employer. Please complete all entries above the Employer Certification section.

### **EMPLOYEE INSTRUCTIONS**

- I. Press firmly and print clearly with **DARK INK**, or type all information requested. Do not use light colors of ink, pencil, felt pen, or erasable ink.
  - II. If you should make a mistake on the Retirement System Election form, line through the error and initial.
  - III. Enter your full name, Social Security Number, birth date, effective date of the change in employment status and position type.
  - IV. **EFFECTIVE DATE** is the first date that service was or will be performed in the new position.
  - V. **RETIREMENT SYSTEM COVERAGE** If you are a member of CalSTRS and have accepted employment in a position subject to membership in CalPERS, enter an “X” in the box preceding “CALIFORNIA STATE TEACHERS’ RETIREMENT SYSTEM” only if you wish to have all subsequent public school service and limited state employment covered by CalSTRS. If you are a member of CalPERS and have accepted employment in a position subject to membership in CalSTRS, enter an “X” in the box preceding CALIFORNIA PUBLIC EMPLOYEES’ RETIREMENT SYSTEM” only if you wish to have all subsequent CalSTRS creditable service covered by CalPERS.
  - VI. **EMPLOYEE SIGNATURE** sign and date the Retirement System Election form.
  - VII. **SUBMIT** the Retirement System Election form to your employer. Retain a copy for your records.
- For further information, you may contact CalSTRS at **(916) 229-3870**, toll free **1-800-228-5453**.
- For information on CalPERS eligibility you may contact CalPERS at **1-888-225-7377**.

### **EMPLOYER INSTRUCTIONS**

Please complete the EMPLOYER CERTIFICATION only after the employee has completed the required employee information.

**CO/DIST CODE/STATE DEPARTMENT** – Enter the appropriate county and district codes. Example: Kern County, Edison Elementary would be 15-012, CA Department of Education 59-174.

**EMPLOYER CERTIFICATION** – Print official’s name and title, sign and date the Retirement System Election form.

**SUBMIT** the completed Retirement System Election form to the County Office of Education or if you represent a state department send it directly to CalSTRS and send a copy to CalPERS.

### **COUNTY OFFICE OF EDUCATION**

Review, sign and date the Retirement System Election.

Mail the original Retirement System Election to the retirement system elected by the employee, and a copy to the retirement system that would normally cover the service. Provide copies for the employer, employee and employee’s file.